

likelihood of misuse. Section D is not exhaustive as the Gateway generates statistical and quantitative components accurately from the data themselves. This includes summary maps for the distribution of records, sample density and a histogram showing the number of records collected through time.

Step 4 – Clarify access and use constraints

We ask you to identify a level of access for public users whenever you provide a new dataset. It is a good idea to build an understanding of access constraints and the access controls available before creating and submitting a dataset. In deciding whether or not to restrict access it is desirable to begin from an open position and then identify any parts of the data that really need to be restricted. The NBN advice note on *Managing Access to Wildlife Data* helps you establish a consistent and logical approach to managing access to data responsibly. If you decide that there are constraints affecting the level at which you are able to share some of your data you can limit their availability using the Gateway access controls.

The Gateway access controls help you manage access to your dataset in this way. Initially two controls are available. Firstly you can control the geographic resolution at which different users can see record locations within your dataset. Secondly you can control whether users can download a copy of the records within



your dataset at the geographic resolution you set above. Without download access users will only see species record locations on maps and summary species lists for sites derived from your dataset. Download access allows users to see the following details for individual records within your dataset; grid reference (limited to the geographic resolution granted to the user), site name (although this is listed as “site name protected” if geographic resolution granted to the user is less than that available for a record), and date recorded. If you grant full geographic resolution and enable download access for the public, registered individual or group, then three additional controls become available for use. You can control whether or not they can view any additional attributes of records within your dataset. You can control whether or not they can view records flagged as sensitive within your dataset. You can control whether or not they can view recorder names associated with the records. A *Slideshow Guide to the Access Controls* provides worked examples and actual screenshots to give you a better idea of what users will see. If you decide

to restrict public access it is important that the reasons for this are set out within the *Access Constraints* field of the *Metadata Form for Species Datasets*. This helps Gateway users understand the need for restriction and the wider NBN partnership better understand and address issues constraining greater access to data.

Use of all information made available through the website is governed by the *Gateway Terms and Conditions*. These are available via a link on every page of the Gateway and are legally binding on everyone that uses the site to access your data. They have been carefully prepared to address the data use concerns of most providers. It's a good idea to check the Gateway Terms and Conditions before you submit any data to ensure they meet your needs. If you find them insufficient you can add any additional terms in the Use Constraints section of the general description for the dataset (metadata).

Step 5 – Submit the dataset

When you have created a valid dataset text file in the *NBN Exchange Format* and completed the *Metadata Form for Species Datasets*, you are ready to submit these to us for loading. If the dataset file is less than 10Mb in size, when zipped, then it can be emailed to us. If your dataset is very large or email isn't convenient for you, you can mail it on a CD. Please contact us for a postal address.

All species datasets are submitted to us under the terms and conditions of the *Gateway Data Provider Agreement*. This is a

formal agreement between you, the data provider, and us, the NBN Trust. It gives us the permission and assurances we need from you to allow us to hold a copy of your dataset and upload it onto the Gateway. It gives you the assurances that you need from us, including that you retain ownership over and control how available your datasets are using the online tools. The agreement is comprehensive and legally necessary to formally authorise the National Biodiversity Network Trust. You are asked to confirm that you have read and agree the *Gateway Data Provider Agreement* at the end of the *Metadata Form for Species Datasets*.

Once received, the dataset text file and metadata form will be checked and subsequently entered into the loading cycle for the Gateway. Once loaded, your species dataset should appear on the website the next time it is updated. We will endeavour to keep you informed of progress. Updates to the Gateway occur on a regular basis as part of a continuous loading cycle. Please contact us if you would like to know the submission date for the next available cycle.

Step 6 – Administer the dataset

You will be notified when your dataset is loaded. It will appear on the Gateway alongside all the other species datasets. Your dataset will be available to the public at the level you identified in the *Species Dataset Metadata Form*. The dataset administrator will now be able to set access levels for specific individuals and groups, as well as alter public access.

If public access to your dataset is restricted, registered users will be able to apply for better access. Requests for better access are sent directly to the dataset administrator by email. We would like you to approve or refuse requests as quickly as possible using the administration tools on the Gateway. We may issue reminders to you once a request is more than 20 days old. The dataset administrator can use the online tools to appoint other individuals as fellow administrators. This may help share the task of administration and cover periods of leave. *The Guide to Administering Species Datasets* offers further information on using the administration tools and is available to download as part of the *Data Provider Pack*.

All documents referred to in this leaflet and information on all aspects of data sharing and use, can be found at **nbn.org.uk**

Contact Details

For further advice and support with preparing species datasets for the Gateway please contact:

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Sharing Information about Wildlife



Guide to Preparing Species Datasets

Preparing Species Datasets

This leaflet will help you to understand the processes you need to go through in order to start sharing your species data through the NBN Gateway.

What is the NBN Gateway?

The NBN Gateway is an Internet based data sharing tool designed by the NBN Trust specifically for wildlife data. It provides a secure environment that groups and organisations can use to share the digitised data they hold and manage with others. Data hosted on the Gateway can be displayed and accessed through the website at www.nbn.org.uk. The same data can also be accessed through other websites and desktop applications using web services.

Data are supplied and administered as individual datasets on the Gateway. Three types of dataset are supported by the Gateway to varying degrees; namely species, habitat, and geographic datasets. This is a guide to preparing and providing species data.

The NBN Trust does not control access to any of the data you choose to share through the Gateway. You retain ownership and control over any species datasets you provide and can choose to withdraw these at any time. Online administration tools allow you alone to control and change who has access to your data at any time.

Who can share data through the NBN Gateway?

We require a copy of the dataset you wish to share through the Gateway. Although copies are stored securely we do not provide an official data management or archive service. As such we accept datasets from groups and organisations that are in a position to manage and maintain those data securely into the future. We do not accept data from individuals. If you would like to see your personal wildlife records on the Gateway we encourage you to pass your data to a local record centre or national recording scheme or society. These groups are well placed to look after your data and make them available through the Gateway.



How to share species data through the NBN Gateway

There are six steps to follow when preparing species data to be shared through the Gateway. Not all of them are particularly time consuming but they are all important. Please read through this entire guide to give you an overview of what is required before you begin to prepare a species dataset. If you decide to provide a species dataset please get in touch with us and we will help support you through the process.

Data Provider Checklist	
Step 1	Identify a role for the Gateway
Step 2	Prepare a dataset
Step 3	Prepare information to support your dataset
Step 4	Clarify access & use constraints
Step 5	Submit the dataset
Step 6	Administer the dataset

Step 1 – Identify a role for the Gateway

If your group or organisation is considering the Gateway as a way of sharing wildlife information, we strongly suggest that you explore the website first. An *NBN Gateway User Guide* has been produced to introduce the main functions of the website. Familiarise yourself with the different ways data are presented and how the access controls affect what you can view and download. Taking time to do this early on will help you identify important opportunities and issues presented by the Gateway. We want the Gateway to be an efficient and effective tool that benefits you and/or your business. If you have problems using it, online help is available throughout the site.

Whether you decide to become a data provider or not, this is a good time to register an individual user account on the Gateway. Once registered, you will be able to apply for enhanced access to restricted datasets. You might also like to consider registering a group account. To register a group account just complete and submit a copy of the *Group Account Registration Form*. Each group account is allocated a Gateway page that you can use to present a description and contact details that other users can view.

The *Gateway Data Provider Pack* contains full instructions for preparing a species dataset and the supporting information to accompany it. The pack comprises:

Guide to the NBN Exchange Format	A document describing the format in which data is provided to the Gateway (relevant to Step 2).
Metadata Form for Species Datasets	A form setting out the descriptive and administrative information needed to support new datasets (relevant to Step 3 & 4).
Gateway Data Provider Agreement	The agreement between you the data provider, and us the NBN Trust (relevant to Step 5).
Guide to administering species datasets	A step-by-step guide to species dataset administration functions on the NBN Gateway (relevant to Step 6).

Step 2 – Prepare a dataset

A species dataset is a collection of records from a data provider that are loaded and administered as a single unit on the Gateway. We can host a dataset of any size. If you browse existing datasets on the Gateway you will see that they can vary from a few dozen records for a single species, to millions of records for a broad taxonomic group. The critical thing to bear in mind when deciding what records to include in a single dataset is that the access you grant to it applies to all the records it contains (excluding those marked as sensitive). In other words, the dataset is the unit of access administration. You may find it helpful to group data into datasets based upon similar access constraints. This will maximise the flexibility of access you are able to grant different users and groups.

The *NBN Exchange Format* is a simple way of supplying data as a text file. It can be created from spreadsheets, databases and exported from some recording packages relatively easily. In its simplest form, it captures just the essential information required for a set of biological records. However, it's flexible and allows you to split a dataset into separate surveys or extend it to include any additional measurements you may have made. The *NBN Exchange Format* is fully described in the *Data Provider Pack* but we can also provide further technical help should you need it.

Once you have created a dataset, you can check whether the file is valid by using a simple software tool, the *NBN Exchange Format Validator (beta)*. Although it does not check everything, it

is a good idea to run your dataset through it to identify common issues at an early stage. This helps to minimise delays once you have sent your data to us. If a dataset file validates using this tool, it is usually possible to load your data onto the Gateway within the next round of loading (Step 5). The tool can be downloaded from www.nbn.org.uk

Step 3 – Prepare information to support your dataset

We ask you to provide additional information to support each dataset you share through the Gateway.

The *Metadata Form for Species Datasets* is designed to help you supply this information. It is divided into four sections. Section A asks for details about your organisation or group. If you have already registered a Group Account as part of Step 1 you will not have to complete all fields in this section. The information you provide is used to populate a public page on the Gateway to represent your group or organisation. This helps people learn more about who provided the data, how to contact you, other datasets you have supplied, and any additional services you may offer.

Section B asks for details about the person you would like to administer your dataset online. They need to have an Individual Account on the Gateway. We will grant them access to online tools to control availability of your dataset, edit supporting information, use online validation tools and view dataset use statistics.

Section C asks you to identify the level of access you would like the public to have to the records within your dataset. There is a framework of access controls that enable you to load data at the fullest detail and then control the level you expose to the public and then to registered individuals and/or groups. It is important to build a good understanding of the controls before you prepare and submit a dataset if you need to restrict public access to any of the information it contains. This section should be completed as part of *Step 4 – Clarify access and use constraints* which provides further information.

Section D asks you to provide background information about the wildlife dataset you are sharing through the Gateway. The form provides best practice editorial advice that we encourage you to follow when drafting this information. A good description is important because it allows potential users to build an understanding of the data, their origin, scope, availability and their suitability for a particular purpose. This will increase the chance that your data are used appropriately and reduce the